

Annual Report and Accounts 2024-25

April 2025



Chair's Introduction:

As I write this introduction I do so with immense pride and gratitude.

Serving WiSE over the past few years has been one of the most rewarding chapters of my life. This charity, rooted in compassion and community, continues to be a lifeline for so many older people across Wetherby and its surrounding villages.

This year's report reflects not only the breadth of our services- from the ever-popular WiSE Owl Café to our expanding Memory Café provision- but also the depth of our impact. We've supported thousands of individuals through social events, transport schemes, befriending and practical help like grass cutting and information services. Behind every statistic lies a story of connection, dignity and care.

I am especially proud of how WiSE has adapted to meet growing demand, strengthened partnerships and remained steadfast in its mission despite financial and societal challenges. Our volunteers, staff and supporters are the heartbeat of this organisation. I thank each of them for their unwavering dedication.

WiSE is in a strong position- strategically focused, community-driven and ready for the future, always guided by the values that make it so special.

Mark Storey

Chair of Trustees.



Trustee's Report:

The trustees present their Annual Report together with the Financial Statement of the charity for the year 1 April 2024 to 31 March 2025.

The trustees confirm these documents comply with the current statutory requirements, the statutory requirements of the charity's governing document and the provisions of the Statement of Recommended Practice (SORP), applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) as amended for accounting periods commencing from 1 January 2016.



A message from our Chief Operating Officer:

It is with great pride that I reflect on another remarkable year for WiSE. As we close the chapter on 2024/25, I am continually inspired by the resilience, warmth and generosity that define our charity and the communities we serve.

This year, we've seen our services grow in both reach and impact. From the expansion of our Memory Café to the continued success of our Welcome Café and each and every one of our core services, every initiative has been driven by a simple but powerful goal: to support older people to live well, independently and with dignity. Our volunteers have contributed over 6,000 hours of their time and our events have brought joy and connection to thousands.

We've also taken important steps to secure our future. Our strategic priorities - focused on sustainability, partnerships and communication - are already bearing fruit. We've strengthened relationships with local health services, broadened our funding base and reached more people than ever through both digital and traditional media.

None of this would be possible without the dedication of our staff, trustees, volunteers and supporters.

As we look ahead, we remain committed to listening, learning and evolving - ensuring that WiSE continues to be a trusted friend to older people across Wetherby and beyond.

Mark Dobson
Chief Operating Officer



Strategic Report

Our strategy for 2025/26

Introduction

In the context of an aging population, the challenges and needs of older people become increasingly prominent. Our charity, dedicated to supporting older and vulnerable individuals in our communities, aims to address these needs comprehensively and compassionately. This strategy document outlines our vision, mission, values, partnerships, sustainability plans and communication strategies to ensure we effectively support our communities.

Vision



To create a compassionate community where older individuals are respected, supported and integrated, living independent lives with dignity, health and happiness.

Mission



To empower and support older and vulnerable people through innovative services, advocacy and engagement, ensuring they and their carers have access to the resources and opportunities needed to lead healthy and fulfilling lives.

Objectives



We exist to support older and vulnerable people and their carers in Wetherby and its surrounding villages.

We also aim to help people who are socially isolated or living with chronic and degenerative conditions- enabling them to stay independent and live active, fulfilling lives in the community for longer.

Values



Caring: showing empathy and understanding to the experiences of older people, acting with dignity, kindness and compassion.

Collaborative: working with communities to achieve our objectives, through teamwork, cooperation and consultation.

Committed: making a difference to the communities we serve, whilst acting with loyalty, diligence and dedication.

Reliable: we do what we say we're going to do and can be trusted to deliver on our objectives efficiently.

Inclusive: we ensure our services are accessible to all older people, regardless of their background or situation.

Conclusion

Our strategy aims to build a sustainable, impactful charity that makes a significant difference in the lives of older people in the communities we serve. By achieving our vision, mission and values - and by strategically engaging with partners, managing our resources and communicating effectively - we will foster a community that fully supports its people to live long and fulfilling lives.



The WiSE feedback survey

In August, we conducted our annual survey for local people to have their say on services for people in Wetherby and surrounding villages.

We're proud of the part we play in supporting older people, however we always want to learn more about the area and its needs, to help us make plans for how we are going to support local people in the future.

The first half of the survey aimed to find out more about what services existing WiSE friends use and the areas we could improve on. The second half of the survey was to determine the needs of the community outside of WiSE services.

The results of this consultation demonstrate that WiSE and its services remain very highly valued by those we serve.

Indeed, the number of people reporting that they access our services weekly is on the rise, thanks in large to the steady expansion of our work.

Whilst demand for dementia support remains strong, a drop in respondents citing this demand in the survey does suggest that the expansion of our memory café provision is making an impact.

The popularity of our social events programme has increased and this is something we will seek to maintain and, if possible, expand in the future.



Other matters of significance during the reporting period

We have had a strong year, delivering our goals across all our core services.

During the reporting period (1 April 2024 to 31 March 2025):

- We received over **165** new referrals to WiSE from friends, family members, retirement life wardens, health services / GP surgeries and more.
- Scheduled **10** different social events, hosting over **170** timetabled activities/groups, which included our regular favourites, Line Dancing, Knit, Natter, Craft and Chatter and Elderberries. We also launched a new favourite - Boston Social.
- We held these groups in **5** different venues, across Wetherby, and surrounding villages. The overall attendance at these events was more than **4,500** and not just older people – more than **1,600** friends of all ages visited our Welcome Café this year.
- We also held some additional one-off special events. **37** friends visited Yorkshire Wildlife Park, **43** cruised on the river Tees and **32** enjoyed a day at Wetherby Races.
- We arranged for more than **60** people to have their grass cut each month.
- We made **730** transport journeys, whereby our volunteers took older people to activities or social engagements and local health appointments that otherwise they may not have been able to attend.
- We ensured between **8** and **11** people received a weekly contact from a friendly caller or visitor.
- We handled **550** contacts via the Information & Advice service, completing 20 blue badge applications and 22 attendance allowance forms.

- There were **650** attendances at the WiSE Memory Café, which supports those living with dementia and their carers by providing an appropriate setting to focus on clients' wellbeing.
- At the end of the reporting period, we had **126** volunteers across our programmes providing us with more than **6,000** volunteering hours.
- We posted more than **600** Send a Smile cards helping to ease feelings of isolation and loneliness across Wetherby and surrounding villages.
- And finally we served more than **10,000** visitors to the WiSE Owl Café. That's a lot of cups of tea and pieces of cake!

In the winter months, we coordinated efforts to provide more than 200 winter warmer packs to older people at a time when heating bills remained astronomically high. The packs were funded by WiSE and Leeds Community Foundation and contained thermal mugs, clothing, blankets, hot drinks and other winter essentials.

Welcome Café and Memory Café – both a lifeline for many of our friends – celebrated their second birthdays. In fact, Welcome Café – where we work in partnership with our friends at Wetherby Town Hall has been continued thanks to the further renewal of our Household Support Funding from the government.

We also use this grant to allow us to support more local people by giving start-up grants to other community groups, such as churches and local parish councils. This has helped us forge excellent community partnerships which we always endeavour to be at the heart of.

Our Activities – An overview

We carry out a wide range of services and activities in line with our charitable objectives. The trustees consider these services and activities provide benefit to older people and their carers in our area.

Our activities and services are promoted in a variety of ways, including actively engaging with local parish councils and community groups. We produce a monthly activities sheet and What's On guide, which is distributed to hundreds of our friends.

Our in-house communication officer provides publicity material to the media in Wetherby and Leeds and we continue to advertise in parish magazines. We display information about our services at GP surgeries, local churches, Wetherby Town Hall, and the One Stop Centre. We also promote our events and activities on our website and social media platforms.

WiSE Owl Café

The café is based in Boston Spa Village Hall. It is still a popular event, acting as a regular meet up for many of our customers, be it for coffee and a chat, or lunch. The café has one staff member supported by a dedicated band of volunteer servers and bakers. It sources its food from local suppliers and volunteer bakers make the delicious cakes and scones. To meet demand, in October we added a new Friday opening in response to the growing range of customers pouring through our doors. The WiSE Owl café now opens on Tuesday to Thursday from 9am to 3pm, and on Fridays from 10am to 3pm.

The café is open for referrals only – both agency and personal. Local GPs and agencies in the area have learnt about our café and often refer. This has resulted in waiting lists to attend the café and so, to cope with demand, we added a third monthly session from January 2024.

The session costs £4 for both carer and person living with dementia inclusive and meets at The Church Rooms, Church Centre St James' in Wetherby every first, second and fourth Wednesday of the month. In this financial year, there were more than 650 attendances at Memory Café.

Line Dancing

Line dancing promotes balance, coordination and is an excellent cognitive exercise which is relevant for our target age groups. In June, our instructor, Julie retired and now we have a new instructor, Ami who is very popular with our friends.

Forget Me Not Café - NEW

In March, we launched 'Forget Me Not' café dedicated to dementia carers, in recognition of the respite they need.

The new respite sessions will take place every three months, thanks to additional funding from the McCarthy Stone Foundation, Grants United Way UK and the dedication of WiSE's army of volunteers. The additional sessions are designed to offer carers who attend our Memory Café a well-deserved break, knowing that their loved ones are in safe hands.

Knit, Natter, Craft & Chatter

Knit, Natter, Craft & Chatter is held every Thursday at Deepdale Community Centre. Every week there is a new craft theme. People are also invited to bring their own project. This group continues to grow in popularity and we have moved to the bigger room at the venue.

Welcome Cafe

Welcome Cafe supports people of all ages with the cost of living crisis and is now well established in the local area. It takes place weekly at Wetherby Town Hall and serves soup, sandwiches and cakes, plus hot and cold drinks.

WiSE Memory Café

Memory Café is now well established and considered a lifeline for those living with dementia and their carers. Sessions are facilitated by a trained staff member, alongside WiSE's volunteers. Support and advice is also offered to family carers to assist them in their day-to-day continuing and challenging caring role.

Elderberries (CEASED) and Silver Social

Elderberries was a monthly social gathering which took place at St Joseph's Church Hall. This was so popular resulting in the room available being too small. Silver Social was a bi-monthly event, but has now replaced Elderberries on a monthly basis with local musicians or entertainers at The Engine Shed, Wetherby.

Boston Social – NEW

Boston Social launched in February. This is a bi-monthly social event which is held at Boston Spa Village Hall and features local entertainers. It costs £5 to attend which includes refreshments.

WiSE Goes to...

In this financial year we enjoyed two day trips outside of Wetherby. The first was to Yorkshire Wildlife Park in Doncaster. The second was a boat cruise of the Tees with afternoon tea. Tickets for our day trips cost around £20 per person which includes coach travel (often subsidised thanks to community funding) and entrance to the event. Both trips sold out and were enjoyed by everyone who attended.

WiSE Goes to the Races

From time to time, we take our friends for an afternoon at Wetherby Racecourse at a subsidised rate of £5 per ticket. This is a popular event which always sells out.

WiSE Goes to the Movies

We have a good partnership with Wetherby Cinema and occasionally offer a film screening for 25 friends. This costs £5, which includes a hot drink and a cake.

Bingo - CEASED

Bingo took place between April and December. It was a monthly event which involved bingo, games and quizzes along with prizes for the winners at Wetherby Town Hall. Due to a shortfall in numbers we put this event on hold, but hope to bring this group back in the next financial year.

Ad hoc events and celebrations

From time-to-time, we host events to acknowledge national celebrations and to raise additional funds to enhance our key services. In this reporting period we held a large scale Christmas party with David John – a tribute to Sir Rod Stewart as entertainment, at The Engine Shed, Wetherby. The raffle at the event raised almost £1,000 which was put towards enhancing the charity's activities programme.

Partnerships

The trustees are particularly grateful to our community partners for all their support. All have helped us to meet our objectives and benefit older people and their carers in our area.

We are especially grateful for the support of Boston Spa Village Hall, which is home to our much-loved Wise Owl Café.

Other local partnerships include:

- St Joseph's Church
- The Methodist Church in Wetherby
- St James' Church, Wetherby
- The Engine Shed, Wetherby
- Bramham Village Hall
- Walton Village Hall
- Thorner Over 55's Club
- Churches Together
- Wetherby District Lions Club
- Wetherby Racecourse & Conference Centre
- Voluntary Action Leeds and Doing Good Leeds
- Local primary care team
- The local NHS
- Outer North East Community Committee
- Sainsbury's Wetherby
- Wetherby Sports Association
- Handpicked Wetherby
- The Wetherby Clinic
- LCAN Leeds Community Anchor Network
- The Oven Door
- Wetherby Cinema
- Wetherby Town Hall
- Eaden Wealth
- Warners Solicitors
- Wetherby and District Foodbank
- Councillor Harrington and Councillor Lamb.

We welcome local groups, whether small and informal or larger in size, to contact us through our Activities Coordinator via email on activities@w-ise.org.uk.



WiSE lifeline cafès celebrate 2nd birthdays

Two of our much loved café's celebrated their 2nd birthday this year.

Welcome Café was initially launched to support people of all ages as they battled the cost of living crisis. The café proved so successful that the short term initiative became a permanent fixture as part of Voluntary Action Leeds' award-winning 'Warm Spaces' scheme.

WiSE Chief Operating Officer Mark Dobson, said: "What started out as a short term initiative to help people through winter hardship proved to be a desperately needed social and economic lifeline to lots of people of all ages right here in Wetherby.

"Although WiSE is best known for its work with isolated, older people, we've always emphasised that the Welcome Café is open to absolutely anyone. You don't need to be over a certain age and you don't need a referral - we'll offer a warm welcome and something to eat to anyone who needs our support.

“

That's the ethos behind the Warm Spaces scheme and WiSE's extended work as a Local Community Anchor Network, supporting vulnerable groups of all ages.

”

Welcome Café opens on Tuesdays from 11.30am to 1.30pm at Wetherby Town Hall. Patrons make a donation of their choice in exchange for food and company in a warm and welcoming space.

The café is supported by organisations including The Oven Door, Sainsbury's and Wetherby & District Foodbank. From time-to-time, other local organisations attend the café to offer advice on how people can stay safe, warm and well.



WiSE's Memory Café which provides a safe supportive space for people living with dementia and their carers, also celebrated its second birthday this year.

WiSE Dementia Lead Emma Collier, said: "This is a really important milestone for the café, with local demand for dementia services only increasing.

“

We know the café is a lifeline to so many people - providing a few hours respite to carers- and enhancing the quality of life for those living with dementia.

“As we get to know attendees, we have been able to integrate some of them into other WiSE activities and events. This included involving them in an afternoon out at Wetherby Races in the VIP area. Our social group ‘Silver Social’ is another popular event.

”

Sessions are facilitated by trained staff alongside WiSE volunteers. Up to 40 people attend each event, incorporating arts and crafts, board games and musical entertainment in a relaxed and friendly atmosphere. Support is also offered to carers to help them in their challenging roles.

Memory Café meets three times a month on Wednesdays, 1.30pm to 3.30pm at The Church Rooms, Church Centre St James in Wetherby. Attendance at the cafe is referral only – through a Memory Support Worker, GP or via self-referral.

To help support carers, WiSE also launched the ‘Forget Me Not’ café in March following the success of its existing Memory Café.

The new respite sessions take place every three months and are designed to offer carers a well-deserved break, knowing that their loved ones are in safe hands.

Funding for the café has come from multiple sources, including the National Lottery Awards For All, McCarthy Stone Foundation and Grants United Way UK.





Information and Advice

This service provides information and advice to over 60s on a range of issues, including how to apply for allowances and benefits, help for those struggling with form filling, how to find trusted tradespeople or carers and signposting to appropriate support organisations and services such as Adult Social Care and Carers Leeds.

The Information & Advice officer works from our Wetherby office, and attends additional planned events throughout the year, for example the WiSE Memory Café at St James' Church Rooms.

From April 2024 to March 2025 there was 650 Information & Advice contacts between the I&A service and WiSE friends, family members, carers, and support organisations such as Linking Leeds.

These contacts resulted in signposts and referrals to appropriate organisations and sources of support,

including Department for Work & Pensions, Leeds City Council, Care and Repair, Carers Leeds and Leeds Directory.

Forty-eight contacts included intensive one-to-one support, including form filling, from benefits to parking bay requests.

The Information & Advice service also assisted with the completion of 20 blue parking badge applications and filled in 22 attendance allowance claim forms, using a telephone appointment service.

During the reporting period, there were 165 new referrals to WiSE, which came from NHS health services, friends, family and carers, Retirement Life wardens and Linking Leeds amongst others.



Information and Advice a case study – Mr and Mrs F

Elderly couple Mr and Mrs F are late 70s and early 90s, living in warden controlled accommodation.

The couple have failing health and care for each other, resulting in increased isolation and loss of access to community with further deterioration to health. They also experience financial hardship.

Mr and Mrs F experienced problems reapplying for their Blue Badges, and made contact with WiSE for help. Failing to renew their expired Badges at the Post Office, they contacted our Information and Advice service. We took action to assist them to re-apply, by completing two on line applications. Both are now able to go out together and with family, using their now renewed blue parking badges.

Mr and Mrs F have also received help with their attendance allowance (AA) applications to increase their household income, and have received 'Send a Smile' greeting cards throughout the year. Further support has also been provided to renew their driving licences. Their garden is maintained with regular grass cuts between spring and autumn as part of the WiSE Grass Cutting Scheme, with potential for additional support with winter gardening jobs too.

Mr F later called us to thank us and confirm his new badge had arrived.

Transport Scheme

The Transport Scheme provides a low cost door-to-door pick up and drop off service for people over 60 who are less mobile, don't drive, or struggle with public transport. The scheme has been running for seven and a half years and is greatly valued by our friends.

The service – which operates in Wetherby and surrounding areas – has a number of trusted volunteer drivers who will collect a service user and drive them to GP and local healthcare appointments, WiSE activities, or to meet up with friends.

Journeys are offered Monday to Friday 8am to 6pm and all bookings are made through our transport booking line. The service is more cost effective than taxis. It costs £2 per journey, plus 60 pence for every mile travelled, which is paid for at the destination. Drivers are able to accommodate fold-up rollators or walking sticks, but unfortunately can't take wheelchairs.

During the reporting period, 730 transport journeys have been completed, whereby the charity's volunteers drive older people to activities or social engagements they would otherwise not have been able to attend.



Transport volunteer – David

David says he's found solace and purpose in volunteering for the Transport Scheme since the death of his wife seven years ago. Over the years, David has developed close relationships with many of his passengers and fellow volunteers. He has also socialised with other WiSE volunteers at various events.

David said: "When my wife died in 2018, I wanted to do something useful to occupy my spare time and benefit the local community. I enjoy driving and had observed the scheme in operation when taking my wife to various WiSE social events during the latter stages of her life. I was impressed by how well-received and popular it was.

"We talk about many things during the journey, such as family matters, hobbies and interests, and local issues. Many of my passengers have previously owned cars and have now stopped driving for various reasons. Our shared experiences behind the wheel often give us something else to talk about.

“

Joining the transport scheme has given me a real sense of purpose, knowing that I am playing a part in helping WiSE run this much-valued and popular service. It has also been good for my mental health and a key factor in helping me overcome grief and get back to living a normal life.

”

"The WiSE transport scheme is unique and well-managed, and long may it continue."



Grass cutting

We deliver the Grass Cutting scheme in collaboration with the HM Wetherby Young Offenders Prison Service, using funds provided by BBC Children In Need.

This unique collaborative project has meant many local people have had access to affordable grass cutting. Once we identify older people in need of help, WYOI provide a trained horticulturist to supervise young offenders who have expressed an interest in developing horticultural skills. It has been fantastic for so many under privileged young people from the prison to be working in the community and learning new skills.

In the reporting period, 60 people have had their grass cut each month.

The gardeners have all been risk assessed for suitability to earn Release on Temporary License before they take part in the project. The aim is for them to use this work experience to go towards a relevant qualification, giving them a greater chance of future employment.



The scheme helps to improve relationships between young and older people and is greatly valued by those who use it. The scheme is only one of its kind in the country and was granted a 'Connecting Communities Award' for the impact it has made so far.

Unfortunately, in the next financial year, our funding provided by BBC Children in Need will be coming to an end due to a change in the BBC's policy. We will be working hard to fundraise internally to keep this much loved scheme going.

'Send a Smile' Scheme



The 'Send a Smile' scheme remains popular with the older community. The scheme was launched as a way of further extending the charity's work to reduce isolation and loneliness in older people.

It is also designed to build new and lasting two-way community relationships, including between organisations like care homes, craft groups and schools. It complements the existing Befriending Scheme for people who live alone and promotes positive intergenerational interactions by establishing partnerships with schools and colleges.

'Send a Smile' encourages people of all ages, from across the region and afar, to submit postcards, pictures or hand drawn cards to make an isolated, older person smile. Cards are sent to the WiSE offices where they are then distributed to our friends.

In this reporting period we have received almost 600 handmade cards – a high percentage of which were made by children. This year we appealed for Easter cards, Christmas cards and poppy cards to commemorate Remembrance Day.

Due to budget restrictions, in the next financial year, Send a Smile will be reduced to Christmas cards only.

“

Betty rang to say thank you for her send a smile card. She also wants to donate £10 towards stamps as she said it's a lovely idea.

”





Befriending



Our befriending service matches an isolated older or vulnerable person living alone with a volunteer who gives up their time to regularly provide friendly conversation and companionship.

Where possible, matches are made based on shared interests and both parties living in the same area. Once a befriending match has been made, each person is introduced in the company of one of our co-ordinators.

Our team of befrienders who come from all walks-of-life are asked to commit to a minimum of one hour per week.

This involves dropping in for a cup of tea and a chat or a telephone call. On average over the year, nine volunteers spent 312 hours visiting and 156 hours making friendly phone calls.

For an older person, regular social interaction helps to break their feeling of isolation and helps to make them feel a part of the community.

For the volunteer, the visits are often satisfying, enjoyable and an opportunity to meet someone new to hear about their stories and experiences.

Volunteering

We actively recruit volunteers over the age of 16 to assist in the delivery of our services. We work with Voluntary Action Leeds and Doing Good Leeds to advertise our volunteering roles, plus on our own social media channels and at times, in local businesses.

Volunteering is a worthwhile and enjoyable activity and there are a wide range of opportunities available with us. Our Volunteer Coordinator is based at our Wetherby offices and welcomes enquiries from people who want to support those in the local community. All volunteers undertake an induction and receive training appropriate to their role.

Volunteers are vital to our success. Without them, we could not continue to develop our services and programme of events. Their help in delivering our services, through roles such as activity helpers, befrienders, dementia supporters, drivers, fundraising and trusteeship means we can continue our vital work.

At the end of the reporting period, we had 126 volunteers across our programmes. The volunteers range from younger people to very senior adults. Our volunteer coordinator is working hard to improve our support through training, recognition and communication. We are also continuing to develop additional volunteering opportunities.

Volunteering – a case study – Megan

Megan, aged 25, regularly gives up her time to support WiSE services- including activities and befriending.

Megan said: "I work at NG Bailey, where we are provided with volunteer days, and it is our choice where we use this time. I chose to volunteer at the Memory Café as my grandmother used to attend one and loved it. It was the highlight of her week and allowed my grandad to have an enjoyable time as well with other carers.

“

My favourite thing about the Memory Café is when there is a live singer. It is wonderful to see everyone sing along and those who can will get up and dance. The happiness that the sessions bring is clear with the smiles on everyone's faces.

”

"Even if people living with dementia do not remember what happened, they will go away having those positive, happy feelings and know the way they feel after the session. The Memory Café also provides a wonderful opportunity for carers to have a break and a chance to have a conversation with others who are experiencing similar situations. I know the Memory Café makes a difference for those living with dementia and their carers as I know it really did for my grandparents and I am proud to be a part of that."





Fundraising

The majority of our voluntary income in the last financial year was raised through charitable trusts and foundations which supported our projects and services. A small amount of income came from local benefactors.

Under the Winter Warmth Programme, our Welcome Café received £34,675.00. Within that figure are two grants totalling £5,600 from Leeds Community Anchor Network (LCAN), £12,500 from the Household Support Fund (HSF), £14,500 from Voluntary Action Leeds (VAL) and £2,075 from Leeds Community Foundation (LCF) for Welcome Café. This also included monies for distribution to other local agencies.

LCF awarded £3,000 for Winter Warmth packs for distribution locally in 2024/5 to help keep people warm. Over time a total of 251 people were helped, 116 last reporting year and another 135 people this reporting year.

Voluntary Action Leeds also granted £1,750 for a listening exercise.

Letters sent to Charitable Trusts focusing on dementia have generated a total of £26,406 from nine separate funders for the WiSE Memory Café. Two of these donations were specifically to fund an extra Memory Café session to provide respite for carers to allow them some free time. These extra sessions were funded by two organisations, McCarthy Stone Foundation and United Way and were launched in March.

Also included in this total was a grant from Wetherby Town Council for two entertainment sessions at the Memory Café.

A change to the fundraising focus in late 2024 has generated £2,580 towards funds for the WiSE Grass Cutting Scheme.

Therefore an overall fundraising total of £63,661 in financial year 24/25 has been achieved which includes unsolicited donations totalling £2,230. One donation was from a local group, Bickerton Chatter and two other local donors.



Community Fundraising

Internally, we raised £4,222.24 from our own fundraising events, raffles, charity buckets and the sale of merchandise.

A total of £3201.68 was raised by community fundraisers via JustGiving.

Here are just four examples of our amazing community fundraisers this year:

Staff at The Wetherby Clinic named WiSE as their charity of the year and raised more than £600 taking part in the Yorkshire 3 Peaks Challenge along with baking, selling books and hosting a collection tin in their reception. Cara, director at The Wetherby Clinic, said: "We are so pleased to have raised such a strong amount of money during the 20 for 20 challenge. The work WiSE does is incredible – and we wanted the charity to know how much we appreciate the services it offers."

Keith, aged 90, hiked the length of Hadrian's Wall to raise more than £400 in aid of WiSE. The veteran completed the 85 mile coast-to-coast trek - which covers some of the most rugged terrain in the country - in just 10 days. Keith said: "It's only recently that I've heard of WiSE. I don't feel lonely and whilst I am happy living and walking on my own, I decided I should have more social activity. I started attending Welcome Café, Line Dancing and the music entertainment afternoons. I find the activities interesting and so, although I'd already booked the trek, I offered to turn it into a fundraising expedition to raise funds for WiSE."

One of our volunteers, Mal, took part in a half marathon raising more than £300 for WiSE. Mal said: "I think WiSE is such an amazing charity. Unfortunately I lost both my nana and grandma during Covid and seeing how isolated they had become in their last couple of years was heartbreaking. I really wish they'd had access to something similar. I really want to help prevent other elderly people from being lonely and isolated and volunteering helps me do that. It brings me joy to see older people get out and socialise. I also love hearing all the stories they have up their sleeves. There is nothing better than hearing what their lives were like 'back in the day!'

And our very own COO, Mark, took part in the Leeds 10k in June for the third year in a row, raising £700 for WiSE's dementia services.

Wetherby in Support of the Elderly Annual Report 2024/25



Governance Structure and Management

Our constitution

WiSE is a Charitable Incorporated Organisation (CIO). It is governed according to a Charity Commission Foundation Model Constitution (dated 22 September 2015) and is therefore detailed and fit for purpose and protects the continuation of the charity.

Our objective

The objectives of the CIO are all for the public benefit.

Chiefly, our aim is to support older people, and those who care for them, who live in the Wetherby area (Wetherby, Linton, Boston Spa, Thorp Arch, Walton, Clifford, Bramham, East Keswick, Harewood, Collingham, Bardsey, Scarcroft and Thorner) and who are socially isolated, or living with chronic or degenerative conditions. This is so that they can retain their independence and continue to live active lives within their community.

Public benefit

In planning our activities, the trustees consider the specific objectives of the charity, along with our vision, mission and values. We review our aims, objectives and activities annually. As part of that process, we consider the outputs of our activities, assess the benefit of those outputs on the lives of older people and develop future activities to make sure our work continues to deliver the most benefit against our charitable objects.

This report contains more information on the way our work has benefited older people over the last 12 months, measured against objectives set at the beginning of the year.

The trustees confirm they have complied with the duty in Section 17 of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Activities

Every year, we see our organisation grow, both in terms of services we provide and the requests for help we receive. It is well-known that older people are living longer and need more support to enable them to live a comfortable and independent lifestyle and through our range of activities and services we aim to make this happen.

We want to place WiSE at the heart of its community. To do this effectively we continually monitor and evaluate the services and activities we provide to ensure they meet the needs of our friends and their carers. Our current provision includes:

- Information and Advice
- Transport Scheme
- Grass Cutting
- Befriending
- Send a Smile Scheme
- The WiSE Owl Café
- Welcome Café
- Memory Café
- Forget Me Not Café
- Line Dancing
- Knit, Natter, Craft & Chatter
- Silver Social
- Boston Social
- WiSE Goes to the Movies
- WiSE Goes to the Races
- WiSE Goes to... (day trips)

The schemes are co-ordinated by a team of staff, with a large amount of work carried out by our 126 volunteers. These volunteers work in many different roles in the community, support roles or directly with friends- not only making many of our schemes possible by giving their time freely, but also bringing a true community perspective to our work.

All our work supports the wellbeing of older people in Wetherby and surrounding area. This means we help people to stay safe, well and live independently in their community for as long as possible.

We are committed to collaborative working and this continued in 2024/25 with renewed partnerships with voluntary, statutory and private sector organisations, all of which were focused on promoting and supporting the welfare of older people living locally. Adopting a joint approach means we can keep our friends and their families as the focus of our attention when designing and delivering new services.

Governance and management

The overall management and control of the charity rests with the individual members of the board of trustees who give their time freely and receive no remuneration or other financial benefits. The charity's trustees meet in accordance with the constitution which requires the presence of at least two or, if greater, a third of its members to be quorate. The Board may appoint a chairperson and revoke such appointment at any time. All business is decided by a simple majority, each trustee having one vote. In the event of an equality of votes, the chairperson of the meeting has a second or casting vote. The trustees are responsible for decisions taken in relation to the strategic running of the charity, but the day-to-day running of the charity is delegated to staff.

Trustee committees

The trustees delegate responsibility for more detailed consideration of the charity's affairs to four sub groups, each including at least two places for trustee members, chaired by a trustee and reporting to the board of trustees. These subgroups are:

- Finance
- HR and Policies
- Strategy and Service Development
- Fundraising and Marketing

Recruitment and appointment of new trustees

The existing trustees are responsible for the recruitment of new trustees. The trustees undertake a skills audit, which identifies specific skills needed to enhance the existing board. In selecting individuals for appointment as appointed charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO. In addition, individuals who apply to become trustees must demonstrate a personal or professional interest in the care and well-being of older people.

Every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of trustees. Trustees retiring at the end of their term are eligible for reappointment. A trustee who has served for three consecutive terms of three years may not be reappointed for a fourth consecutive term, but may be reappointed after an interval of at least one year.

There shall be a minimum of four trustees and a maximum of 10. At the end of the reporting period there were 6 trustees.

Following appointment, new trustees are introduced to their new roles and given a Trustee's Handbook, which covers all aspects of the role. This includes a copy of the Charity Commission's guide 'The Essential Trustee' and copies of the Charity's Governing Document, financial statements and a guide to the policies and procedures adopted by the charity. An induction checklist is included to ensure everything is covered and signed off. All Trustees are Disclosure & Barring Service (DBS) checked and references obtained.

Voluntary support

Whilst voluntary help is not assigned a value for the purposes of the financial statements, we benefit immensely from the services provided by our incredible volunteers.

During the reporting period, 126 volunteers completed more than 6,000 volunteer hours between them. This volunteer contribution supports all of our schemes as well as supporting functions and fundraising.

The trustees thank all our volunteers for their continued support. Without their time and skills, our impact would not be as significant as it is.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. Strategic risk management is regularly overseen by the board of trustees. There is an overarching risk management policy which involves a regular review of key risks faced by the charity. It also sets up systems and procedures to address those potential risks and to minimise any impact the charity if the risks materialise. The risk register is reviewed annually.

The trustees also have policies in place addressing the main operational risk areas. The trustees consider the following to be the key risks facing the organisation:

- Similar to many charities, the main risks facing WiSE are financial, relating to the loss of contracts, a reduction in grant income or a reduction in public donations, thus impacting on income targets. Due to the reliance identified above, we need to take account of changing economic, policy and social conditions which may affect individual supporters, corporate donors and statutory and trust funders. These risks are managed proactively through the assessment of new opportunities and existing contracts, planned appeals and the continuous review of organisational costs. An appropriate level of funds will be maintained to help mitigate the main financial risks. Additionally, trustees monitor results quarterly and consider the long term impact of emerging trends. They also oversee compliance with fundraising regulation and ensure fundraising is carried out to high ethical standards. We are continuing to invest in income diversification projects to mitigate the risk where possible.

- We recognise the importance of safeguarding vulnerable people in all areas of our work. The charity has a safeguarding policy which applies to all staff and volunteers who have regular contact with older people. This policy is supported by safer recruitment practice and training programmes for staff and volunteers. Although we believe the operational procedures have strong safeguards embedded in them, it remains a key risk on our risk register.
- We recognise the risks associated with information security and the importance of protecting our IT systems from malicious attack and unauthorised access and misuse. Security measures are in place to protect from unauthorised access to IT systems and to test vulnerabilities in the network. We hold a limited amount of personal information about our service users. We have a Data Protection policy in place which ensures only authorised access to personal details and continues to enhance the security of the data in line with best practice.
- We deliver services where they are needed. In all situations the health and safety of our staff, service users and others working with us is a prime concern. A significant proportion of staff and volunteers are lone workers, making visits to a range of locations. The charity has appropriate policies, guidance and training, and any health and safety concerns are reported to the trustees at regular board meetings.

Fundraising

All our fundraising activities deliver on our fundraising promise. We proactively comply with all fundraising related legislation and marketing regulation. All of our fundraising activity has been led by staff and volunteers.

As part of our approach, policies and standards, we make sure we protect vulnerable people and other members of the public from inappropriate behaviour. We proactively train everyone involved in fundraising, with clear processes in place to monitor and manage every interaction. In the past year, we have not uncovered any failure by staff or volunteers to comply with these schemes and standards and we received no fundraising complaints in 2024/25.



Independent Examiners Report

Independent Examiner's Report to the Trustees

I report on the accounts of the Trust for the year ended 31 March 2025, which are set out on pages 2 to 7.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed. The Charity is preparing accrued accounts and I am qualified to undertake the examination by being a qualified member of The Association of Chartered Certified Accountants.

It is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act;
- To follow the procedures laid down in the General Directions given by the Charity Commission under section 145(5) of the 2011 Act; and
- To state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and the seeking of explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with s. 130 of the Charities Act 2011; and
 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the 2011 Act have not been met; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Martin Knaggs
G L Barker & Co LLP
Chartered Certified Accountants
49 Austhorpe Road
Cross Gates
Leeds
LS15 8BA

Signed 

Date: 30/09/2025

Statement of Financial Activities

	Note	Unrestricted Funds £	Restricted Funds £	Total 2025 £	Total 2024 £
Turnover					
Core funding		132,396		132,396	132,396
WISE Café		65,243		65,243	54,751
Hubs activities		19,396		19,396	13,584
CIN Gardening scheme grants		40,000		40,000	40,000
Dementia Café			26,916	26,916	20,480
Donations and grants		9,862		9,862	15,987
Household Support Fund		32,250		32,250	32,100
		<u>299,147</u>	<u>26,916</u>	<u>326,063</u>	<u>309,298</u>
Other income					
Employment allowance		5,000		5,000	5,000
Interest income		4,733		4,733	4,647
		<u>9,733</u>	<u>-</u>	<u>9,733</u>	<u>9,647</u>
Total Income		308,880	26,916	335,796	318,945
Expenditure					
Rent		3,233		3,233	4,850
Insurance		1,320		1,320	1,195
Wise Café expenditure		29,074		29,074	21,419
Dementia Café expenditure		-	15,758	15,758	11,405
Salaries		177,573		177,573	169,861
Social security		14,253		14,253	12,034
Pensions		3,728		3,728	3,304
Telephone and internet		1,797		1,797	2,414
Post printing and stationery		5,969		5,969	6,654
Advertising and marketing		904		904	2,787
Travelling		1,616		1,616	3,058
Hub activities expenditure		22,023		22,023	27,876
CIN gardening expenditure		43,775		43,775	40,120
Computer equipment and consumables		7,676		7,676	9,234
Subscriptions		478		478	451
Sundry expenses		1,443		1,443	2,443
Training		1,729		1,729	969
Accountancy fees		2,940		2,940	2,760
Bookkeeping		2,961		2,961	2,622
Legal & professional fees		3,231		3,231	2,701
Donations		2,070		2,070	4,050
		<u>327,793</u>	<u>15,758</u>	<u>343,551</u>	<u>332,207</u>
Profits before finance costs		(18,913)	11,158	(7,755)	(13,262)

Balance Sheet

	Note	Unrestricted Funds	Restricted Funds	Total 2025	Total 2024
Finance costs					
Bank charges		<u>583</u>	<u>-</u>	<u>583</u>	<u>659</u>
		583	-	583	659
Net Profit		<u>(19,496)</u>	<u>11,158</u>	<u>(8,338)</u>	<u>(13,921)</u>

The notes on pages 5 to 7 form part of these accounts.



Notes to the Accounts

	Notes	£	2025 £	£	2024 £
FIXED ASSETS					
Tangible fixed assets			-		-
Current Assets					
Debtors and prepayments	5	2,843		2,487	
Cash at bank and in hand		<u>350,886</u>		<u>355,476</u>	
		353,729		357,963	
Current Liabilities					
Creditors	6	<u>21,084</u>		<u>16,980</u>	
NET CURRENT ASSETS			<u>332,645</u>		<u>340,983</u>
NET ASSETS			<u>332,645</u>		<u>340,983</u>
FUNDS					
Restricted funds			106,036		94,878
Unrestricted funds			<u>226,609</u>		<u>246,105</u>
			<u>332,645</u>		<u>340,983</u>

Approved by the trustees on
and signed on their behalf by:



Mark Storey
Chair of the Trustees

Dated: 29/09/25

The notes on pages 5 to 7 form part of these accounts.

Notes to the Accounts



1. ACCOUNTING POLICIES

a. **Basis of preparation of accounts**

The accounts have been prepared under the historic cost convention and in accordance with applicable accounting standards and follow the recommendations in 'Accounting and Reporting by Charities' (SORP).

b. **Income**

Grants receivable are accounted for on receipt, unless the period to which they relate is specified by the funder, in which case they are applied to the appropriate accounting period and that part of the grant relating to a future accounting period is included in deferred income. Voluntary income and donations are accounted for as received by the charity.

c. **Resources expended**

Resources expended are recognised in the period in which they are incurred. Resources expended include attributable VAT which cannot be recovered.

d. **Unrestricted funds**

Unrestricted funds are donations and other incoming resources receivable or generated for the objects of the charity without further specified purpose and are available as general funds.

e. **Restricted funds**

Restricted funds are those funds which are to be used for specific purposes as laid down by the donor. Expenditure which meets these criteria is charged to the fund.

Notes to the Accounts

2. NET OUTGOING RESOURCES FOR THE YEAR

The net outgoing resources for the year are stated after charging:

	2025	2024
	£	£
Accountancy	2,205	2,070
Independent Examiner's fee	735	690

3. STAFF COSTS AND NUMBERS

Staff costs were as follows:-	2025	2024
	£	£
Wages and salaries	188,682	177,429
Social security costs	14,253	12,034
Pension contributions	<u>3,728</u>	<u>3,304</u>
	<u>206,663</u>	<u>192,767</u>

The average weekly number of employees during the year, was as follows:-

	2025	2024
Charitable work – activities for the elderly	11	11
Administration	<u>-</u>	<u>-</u>
	<u>11</u>	<u>11</u>

All staff members do their own administration.

4. TRUSTEES

No remuneration or expenses were paid to trustees in the year.

Notes to the Accounts

5. DEBTORS AND PREPAYMENTS

	2025	2024
	£	£
Prepayments	2,843	2,474
Other Debtors	-	13
	<u>2,843</u>	<u>2,487</u>

6. CREDITORS

	2025	2024
	£	£
Trade Creditors	5,955	9,844
Accruals	3,123	2,842
Social Security & Other Taxes	-	3,191
Pensions	1,317	1,103
Deferred income	10,000	-
Wise Café Tips	689	-
	<u>21,084</u>	<u>16,980</u>

7. ANALYSIS OF NET ASSETS BY FUND

	Unrestricted Funds	Restricted Funds	Total
	£	£	£
Current assets	247,693	106,036	353,729
Current liabilities	(21,084)	-	(21,084)
	<u>226,609</u>	<u>106,036</u>	<u>332,645</u>

8. MOVEMENTS IN FUNDS

	Balance 1 April 2024	Movement in Incoming	Resources Outgoing	Transferred (out) / in	Balance 31 March 2025
	£	£	£	£	£
Children in Need Gardening Scheme	-	-	-	-	-
Dementia Café	94,878	26,916	15,758	-	106,036
Restricted Funds	94,978	26,916	15,758	-	106,036
Unrestricted Funds	246,105	308,880	328,376	-	226,609
	<u>340,983</u>	<u>335,796</u>	<u>344,134</u>	<u>-</u>	<u>332,645</u>

9. INDEMNITY INSURANCE

Indemnity insurance has been purchased to protect the charity, trustees and officers from loss arising from the neglect or default of the trustees or officers.

Financial Review

During the period covered by this set of accounts, WiSE continues to operate both strongly and efficiently, from a financial perspective which reflected in the 2024-2025 Financial Statements.

BANK ACCOUNTS:

The Charity operated with two bank accounts.

CURRENT ACCOUNT:

This account is for the daily income and expenditure of the organisation.

Within this account are restricted funding, which is ring-fenced for specific projects.

All the funds within this account are to deliver services and activities, primarily for older residents, but also for the broader community based on a particular funding stream.

Each element of funding that sits within this account, is monitored and records are retained and updated on a monthly basis. This enables us to present a clear audit trail at any time and produce a correct set of accounts at our year end.

RESERVE ACCOUNT:

Funds in the Reserve Account held in a savings account with the Yorkshire Building Society. These reserves fulfil the Trustees responsibilities in ensuring that:

- * Monies received are to further the purpose and work of the Charity;
- * The Charity can meet its long-term debts and obligations; and
- * The Charity has reserves to enable it to fulfil its legal and statutory obligations if wound up.

The trustees review the reserve account on an annual basis to ensure that reserves held in this account is sufficient.

FUNDING RECEIVED:

The Charity's principal source of funding is from Leeds City Council Adult Care, BBC Children in Need, Government obtained Household Support Fund, and smaller one-off grants and donations.

Each funding stream is individually monitored, and income and expenditure recorded for presentation and inclusion in the year end accounts.

FUNDRAISING:

Fundraising is extremely important to our charity. We therefore thank every organisation and individual who has contributed to our funds during the past fiscal year.

Without that generosity, we would not be able to successfully achieve our objectives around supporting the elderly and vulnerable in our area.

Corporate information

Wetherby in Support of the Elderly (WiSE)
(A charitable incorporated organisation).

Principal address:

24 Westgate
Wetherby
LS22 6NL

Telephone 01937 588994

Website www.w-ise.org.uk

Registered charity number - 1163698

Trustees

The charity trustees are appointed as and when appropriate by the body of trustees in office. The trustees who served during the period and those currently in office are:

Mark Storey (Chair)

Caren Rowe (Treasurer)

John Wardley (to September 2024)

Norma Harrington (to September 2024)

Michelle Atkinson

Manjit Curtis

Hugh Douglas Roberts (from September 2024)

Rebecca Farren (from September 2024)

Chief Operating Officer

Mark Dobson

Independent Examiner

GL Barker & Associates,
47-49 Austhorpe Road,
Leeds,
LS15 8BA

Bankers

Barclays Bank Yorkshire Building Society - online

Thank You

The trustees would like to offer their thanks, again, to everybody who has supported the organisation either through volunteering, offering their valuable time and skills or through invaluable financial support.

We remain as committed as ever to supporting older people in Wetherby and our surrounding communities.

Thank you!



© Wetherby in Support of the Elderly 2025.

The copyright of all material appearing in this publication belongs to Wetherby in Support of the Elderly, it may not be reproduced, duplicated or copied by any means without our prior written consent.

CIO Registration No. 1163698